

## Applicant Initiated Interview Request Form

Application No. : 09/575,283 First Named Applicant: Charles Evett et al.

Examiner: Johnna Stimpak Art unit: 3623 Status of Application: Pending

**Tentative Participants:**

(1) J. Robin Rohlicek (43, 349)

(2) \_\_\_\_\_

Proposed Date of Interview: \_\_\_\_\_ Proposed Time: \_\_\_\_\_ (AM/PM)

**Type of Interview Requested:**(1) ☒ Telephonic (2) ☐ Personal (3) ☐ Video ConferenceExhibit To Be Shown or Demonstrated: ☐ YES ☒ NO  
if yes, provide brief description: \_\_\_\_\_

### Issues To Be Discussed

Issues (Rej., Obj., etc)	Claims Fig. #s	Prior Art	Discussed	Agreed	Not Agreed
(1) Rej. 103(a)	1	Anderson	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Brief Description of Arguments to be Presented:**

Claim 1 requires

"applying one or more of the set of global rules to said lead, including applying a routing rule to said lead such that a first user is selected..."

as well as

"applying one of more of a first set of rules which are associated with the selected first user to the first lead, including applying a routing rule to said lead such that a second user is selected"

Anderson appears to disclose

"information specifying a set of preferences which correspond to a type of customer the agent would like to solicit"

1. The applicant seeks clarification of how Anderson discloses or suggests both "global rules" as well as "distinct sets of rules associated with each of said users".
2. The office action recognizes that "Anderson et al does not explicitly teach applying a routing rule such that a second user is selected". The applicant also seeks clarification of how Anderson suggests the recited "applying ... rules associated with the selected first user ... such that a second user is selected."

An interview was conducted on the above-identified application on \_\_\_\_\_

**NOTE:**

This form should be completed by applicant and submitted to the examiner in advance of the interview (see MPEP § 713.01).

This application will not be delayed from issue because of applicant's failure to submit a written record of this interview. Therefore, applicant is advised to file a statement of the substance of this interview (37 CFR 1.133(b)) as soon as possible.

\_\_\_\_\_  
(Applicant/Applicant's Representative Signature)\_\_\_\_\_  
(Examiner/SPE Signature)

Attorney's Docket No.: 10844-002001

**OFFICIAL COMMUNICATION****FACSIMILE****FOR THE PERSONAL ATTENTION OF:****EXAMINER JOHNNA STIMPAK****U.S. PATENT AND TRADEMARK OFFICE (PATENT)****GROUP 3623 FAX NO: (703) 746-3956**

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Applicant : Charles Evett et al.  
Serial No. : 09/575,283  
Filed : May 22, 2000

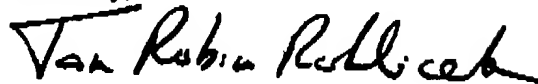
Art Unit : 3623  
Examiner : Johnna Stimpak

Title : CUSTOMER LEAD MANAGEMENT SYSTEM

Examiner Stimpak:

Attached to this facsimile communication cover sheet is an Interview Request Form which sets out issues that we would like to discuss during the upcoming telephone interview. I look forward to hearing from you whether any of the proposed times on Wednesday 3/3/04 through Friday 3/5/04 are available for the interview.

Sincerely,



J. Robin Rohlicek, J.D., Ph.D.  
Reg. No. 43,349

Date: March 2, 2004

Fish & Richardson P.C.  
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NOTE: This facsimile is intended for the addressee only and may contain privileged or confidential information. If you have received this facsimile in error, please immediately call us collect at (617) 542-5070 to arrange for its return. Thank you.